



Agenda Item 6

May 19, 2015

ITEM NAME: Customer Services and Support Performance

PROGRAM: Customer Services and Support

ITEM TYPE: Information

EXECUTIVE SUMMARY

Customer Services and Support (CSS) is dedicated to achieving the highest level of service in administering pension and health benefits. By continuously measuring performance in all core operations we are able to adapt to the ever changing customer service environment and diverse needs of our customers by enhancing our service delivery. This information item presents the CSS Performance Dashboard for the third quarter of Fiscal Year (FY) 2014-2015 and a status update on our projects designed to enhance the customer experience.

STRATEGIC PLAN

This item supports the California Public Employees' Retirement System (CalPERS) Strategic Plan Goal B: "Cultivate a high-performing, risk-intelligent, and innovative organization," as well as our objective to "deliver superior, end-to-end customer service that is adaptive to customer needs."

BACKGROUND

The CSS Performance Dashboard captures our service levels and measures the impact of service and process improvements on our operational effectiveness and customer experience.

As part of our ongoing service delivery transformation, CSS engages in many projects aimed at optimizing the customer experience by improving the access, effectiveness and quality of our services. During the third quarter, as part of our Lean 6 Sigma (L6S) Project we saw improvements in our Disability Retirement processes. In addition, our Regional Offices began utilizing new business analytics and we completed the final phase of our correspondence revision project.

ANALYSIS

CSS Performance Dashboard

To allow the Board of Administration to evaluate whole programs most effectively, we report broad indicators of performance and exceptions requiring further attention in our Performance Dashboard (Attachment 1).

For the third quarter FY 2014-2015, CSS reflects a green status in all performance attributes. We included additional information regarding call-wait times and membership determinations.

Customer Contact Center

The Contact Center experiences increased call volumes associated with the beginning of the calendar year. As a result, we were below our newly implemented call wait time service level target for the third quarter. The average wait time for those customers who remained on the line was just under three minutes during the third quarter.

To help meet the increased customer demand and mitigate an elevated vacancy rate, several actions were taken during the third quarter. Non-agent staff were temporarily assigned to assist with phone and electronic inquiries and steps have been taken to streamline the recruitment process to reduce the time our positions remain vacant. We expect improvement in our service level over the coming months as agents are hired into the vacancies and complete the necessary training to assist on the phones.

Membership Determinations

The membership team continues to process recently received cases within service levels while working to reduce backlogged inventory. During the third quarter, we processed many backlogged items, and as a result, the overall percentage of cases completed within service levels dropped. As backlogged inventory is reduced, the percentage of cases completed within service levels will increase.

CSS Projects Update

Regional Office Appointment Management

Using new customer flow management technology highlighted in the February 18, 2015, CSS Performance update, we began utilizing business analytics to identify trends and enhance appointment activity in the Regional Offices. We are currently developing and implementing job aids and training to improve the efficiency, consistency, and quality of our most frequent type of appointment, service retirement counseling.

Additionally, the Regional Offices are now offering more prescheduled appointments during low volume periods of the day. As more historical data is collected, we will continuously use these analytics to identify customer behavior trends and service enhancement opportunities.

Correspondence Revisions

Over the past year, CSS completed a series of projects to revise our forms and standardized letters. We revised high volume and frequency forms and letters from several program areas to improve clarity, incorporate CalPERS brand voice, and ensure language is consistent with current terminology, business processes, and information systems. We expect the improved clarity of our correspondence to reduce the number of follow-up inquiries and enhance the customer experience.

Lean 6 Sigma

To implement the L6S Project the Disability Retirement Section made changes in August 2014, to shorten the determination process for a disability retirement application. The first changes included reducing wait times, streamlining steps, reducing rework, and using a more active customer service model.

The Disability Retirement process is dependent on obtaining information from outside sources (medical records and reports, workers' compensation). In an effort to shorten the process we now actively reach out to members by phone at critical points in the process to gain their cooperation and involvement in gathering the various medical records needed to make our determination.

Additionally, new member educational materials were developed, such as a Computer Based Training (CBT) course that guides the member in completing their disability application, and a one page guide giving a visual overview of the requirements and process flow. Existing publications and training materials were revamped, specifically the CalPERS Publication 35, A Guide to Completing Your CalPERS Disability Retirement Election Application.

The L6S project also identified longer-term improvements such as electronic transmission of medical records, automation changes, and regulatory language that are being pursued which will enhance the quality and timeliness of this process. As a result of our efforts we have seen improvements in processing levels in this area.

Employer Response Team & Employer Dialogues

The Employer Response Team (ERT) continues to process critical employer inquiries on a timely basis. Employers surveyed on ERT services have indicated a high customer satisfaction rating. Additionally, we hosted three Employer Response Dialogues (ERD) this past quarter in Fresno, Orange and San Jose. The ERDs allow us to engage directly with employers and discuss relevant retirement topics aimed at improving our customer service.

BUDGET AND FISCAL IMPACTS

Not Applicable

BENEFITS/RISKS

Not Applicable

ATTACHMENTS

Attachment 1 – Customer Services and Support Performance Dashboard –
January 1, 2015 – March 31, 2015

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